

**IMAC IT Committee Minutes
February 12, 2004
1 W. Wilson St. Madison
Room 672**

Present: Jim Jones, Dave Hippler, Laurie Teubert, Jeff Esterholm, Evie Ryan-Tondryk, Marty Carrerras, Bob Martin, Sara Martin, Melissa Otter, Pam Waffle, Bill Blank, Tony Sis, Luann Page, Jeanie Brandl, Mal Jones, Kevin Kilkenny, Ken Germanson, Divya Nidhi, Eduardo Zarate, Jill Jokela, Jayne Wanless, Gary Runk

Present via phone conference: Dianne Peterson, Janice Tripp

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| Introductions | The group made introductions. Ken Germanson, Community Advocates of Milwaukee, is joining the committee for the first time today representing the Covering Kids and Families Coalition. |
| Review and Approve minutes | The minutes were approved. |
| Review Active IMAC IT roster | We'll postpone this since Debbie Bigler couldn't attend today's meeting. Jeannie had some corrections on the roster and gave them to Jim. |
| Review CARES changes | <p>CAF Addendum changes - Melissa: A fix was done on the CAF addendum, but the corrections are not done yet. Another PCR was written to finish it. It still prints a partial page and the formatting will be fixed.</p> <p>The Medicaid Rollup notice is working correctly now. Laurie will issue an RAQ on the current status.</p> <p>February CARES moves - Evie: The CMCA updated version is moving. It was in the worker wish list. Jim: The CNI IT committee wasn't aware of this change and doesn't like it. The case totals were removed because it wasn't accurate. A field ("move all") was moved so people wouldn't accidentally transfer their whole caseload. Those are the only changes. The group thought this was helpful.</p> <p>Another wish list item is to move RFA's and closed cases off of CMCA. Discussions on this continue because each county does this differently. Maybe there should be a county-wide closed caseload that all cases are moved to? Jim: We should draft an email for Amy to send to CARES coordinators on what they think. We want to know what they want and how they deal with closed cases. Or maybe we should have a statewide closed caseload for cases that are closed for more than 30 days for all programs and there is no EBT balance? The group decided against this and recommends a closed caseload be defined as one where all AGs are closed for 30 days or more, regardless of any outstanding FS balance on the QUEST card.</p> <p>Transitional FS – This is moving at end of February and an Ops Memo (04-06) addresses this. See http://dhfs.wisconsin.gov/em/ops_memos/2004/default.htm</p> <p>Interim Reporting for FS- This is moving at end of February and an Ops Memo (04-</p> |

06) addresses this. See http://dhfs.wisconsin.gov/em/ops_memos/2004/default.htm

Medicaid Annuities - Effective March 1, the amount of an annuity purchased on or after March 1 will count as an asset. This is big loophole closure. Ops Memo 04-03 addresses this. See http://dhfs.wisconsin.gov/em/ops_memos/2004/default.htm

Automated Case Directory (ACD)

Suggestions for ACD improvements were solicited by Liz Green of Dane Co., from other supervisors around the state in her role as co-chair of the W-2 Contracts & Implementation IT Subcommittee. Copies of comments were given to the group.

Bob Martin: There are four issues with the ACD:

- 1) There are some problems with Webl in the current version,
- 2) Training of Webl and the data warehouse,
- 3) Some EOS reports were turned off for W-2 (race/ethnicity for old definitions of race ethnicity), and
- 4) Expectations of the ACD - is it a management type tool? Is it a worker tool replacing EOS?

Jim: We can do 4 things

- 1) Change the extract and change the ACD,
- 2) Create an FAQ that will help workers & supervisors handle routine activities associated with the ACD and other data warehouses. However, one problem we've run into is that some manipulation of this data can happen better in MS Excel, but many of the local agency workers and supervisors don't necessarily understand Excel and spreadsheets. Workers need to know this and other standard software (MS office suite applications like Word, Excel, PowerPoint, Internet Explorer)
- 3) Training – We don't need to do training on each data mart. We need to train on the tool (Webl) ,
- 4) We'll still need to do ad hoc reports through systems section (Mal, Kevin). Any report request should go directly to Evie Ryan, preferably via email.

Tony thinks staff need to learn how to manipulate data too. Most know how to read data in excel, but not how to manipulate it. It has not necessarily been a job requirement of an IM worker in the past. With this tool and others that are coming their way, it may be time now.

ACD Business Questions Phase II The group reviewed this to-do list for requests for Webl reports. Who is this important to? Workers, Supervisors, or the State? And what is the priority? The items are ranked below with a number between 0-10 and the group(s) to which the item is most important. Refer to document titled Business Questions Phase II estimates dated 02/11/04.

Item 4a – 2, State

Item 5c- 1, All

Item 7 - 4, both

Item 11- 1, both

Item 13- replaced by new item below.

Item 14- 4, both from state List of cases with CC and whether they have cc expenses so you can compare.

A new item will replace item 13- 10, all: Unconfirmed intakes report. Since ACPA

override filing date is not always valid. It will work after CARESWeb is up.

New report: 4, cases with EI, kids under 13, and no CC expenses. Also cases with CC.

Item 24- 8, both

Item 35- W-2 report. The group will not address this.

Item 36- dropped

Item 37- dropped, see an FAQ on this. The FAQ must be written.

Item 38 - List of cases having utility expenses and no shelter expenses and vice versa, 4, workers, sups, and state.

Item 39- dropped

Item 40- 10, being worked on already

Item 41- End unmet deductibles? Yes, 10, all. The work on this is already in progress.

Item 42- 5, workers and sups.

Item 43- dropped, going in this month for TFS, and will be in the FSDW

These are new items that will be added to the list:

Item 44- 8, workers

Item 45- ??

Item 46- ? We'll ask at the IMAC committee

Item 47- 10, workers and sups

Item 48- dropped, Do FAQ on this

Item 49- dropped, covered by 13 and 24

Item 50- ?

Item 51- 10, (Add EI to this report), all

Item 52- ?

**CARES
Production
Calendar**

Should we request that the CARES production calendar look more like the CC calendar, which shows times CARES is available and maybe ACT? We can only post this late in the month or the next month. The schedule can change too much. Sundays are never available and also with Friday evenings because of DOA Infotech maintenance. The website for this is

<http://workweb.dwd.state.wi.us/partner/cares/default.htm>

Note: you need access to DWD's LAN to get to this secure site.

Some agencies request access after 7pm and on weekends because they're still working.

We'll request that the last months calendar is removed so it doesn't confuse people who think they're looking at a future month.

**BC and New
Hire Employer
Verification
Process**

We'll talk about this at the March IMAC IT Subcommittee meeting.

**Web Projects:
CARES Worker**

Sara Martin handed out a printout of a PowerPoint presentation. Timeline: Jim said

Web

the original timeline is changing because dependencies have changed. It took a long time to determine if CC and W-2 were going to be included. That was 4-5 weeks late and other infrastructure issues were resolved 4-5 weeks late. Also, hardware purchases took more time than we thought. That's all in place and the timeline is revised now. Jim handed out a revised timeline. The move date is now estimated to go live 11/29/04.

Self Service Web- The Self Service Web has 2 possible names: 1) AMIE (Am I Eligible), and 2) Self Help Wisconsin. This is scheduled to move on 08/2/04. It will address Food Stamps, SeniorCare, and MA for families (including BadgerCare) only. The state will advertise with radio and print ads. We may change the name of Food Stamps at the same time. The feds have allowed each state to rename the FS program, but have not decided on a federal name for Food Stamps. Other states have already changed the name of their FS program.

An informal vote of the group showed the committee preferred AMIE as the name of the self service web.

CARES Web- Sara:

Comments: Case comments will have the workers name and worker number on the page with the comments. We'll also add a key for high priority comments, but what to put? And what's a high priority? Tony suggested we put a flag or exclamation point next to comment if it's important. We should allow a user to delete the icon later if it's not important anymore. The group decided that we would allow a user to sort by 1) important/not important, 2) chronological order, and 3) type of comment: reviews, intakes, or general.. There will also be word-wrap for case comments so entering and reading comments will be easier.

Case comments will be in a different font type. The characters have a fixed width. This is a database requirement because the available characters must be counted. Also, case comments will have the ability to be deleted on the same day by the same worker. Comments can't be deleted on or after the day they're written.

Overview: Sara discussed the screen layouts and defined the portions of the screens. The "Tran" concept will be gone. Users can enter a case/RFA/PIN in a quick select field and click on a link to a screen at anytime in the left navigation pane. Someone suggested that we enlarge the Primary Person name font so that it stands out more. Deloitte said they could do this.

The reference table viewer is a link next to each enterable field that will show all possible values from the current reference table. There is also a drop down box that will show just the abbreviation and full name of the possible values for that field and case. The reference table viewer icon is next to this dropdown listbox.

Dave and Jim discussed the Help screens, wizards, handbooks, and resources tabs that will be available in the CARES Web.

System Help: This will correspond to the screen level help found now in CARES.

Wizards: This is like a process level help that will explain processes like a Baby Add, a review, an intake, etc. This is a new concept for CARES that will incorporate info

from training and the CARES Guide, as well as information that hasn't been available before.

Handbooks: A separate tab will bring up a page that has links to all policy handbooks that a CARES user may need. In the future, we may try to incorporate the handbook text into this page. This is an advanced feature and would require a lot more maintenance since sections change and policy changes often. See more on online handbooks below.

Resources: The resources tab will list links to various other web sites that provide resources to an IM worker, such as the Eligibility Management homepage.

Sara continued discussing Client Registration screens and fields. See the PowerPoint handout attachment.

Online Handbooks

Dave: Links to the handbooks will be found on the handbook tab from within the CARES web help window. Each handbook will pop up in a new window when a link is clicked.

The Medicaid Eligibility Handbook will be converted to RoboInfo this spring after the 04-01 release is issued. The FS Handbook will be converted in the summer, followed by the IMM in the fall. All handbooks will have the same look and feel. There will be great improvements in searching, including natural language searching (typing in a question, like on "[askjeeves](#)".) Words can be defined and made into links that will lead to a popup of the definition.

DHFS is discussing how much information will be included on one html page: a whole chapter? A whole subsection like 1.4.0? Or down to the smallest level of info at the 3rd or 4th sublevel. The FS handbook is set up this last way and users complain that it's hard to find out what's before or after the section.

Perhaps all handbooks will be divided into pages that contain info at the first subsection level (like 1.4.0, 1.4.2, 1.4.3 etc all on the same html page) and there could be links to the subsection before and after the current page. All handbooks will have the same font size, type, and formatting, etc.

Writers will be able to view reports that show what pages are accessed most, what is searched on the most, etc. This information can be helpful to management and trainers.

There will be version control, meaning that old versions of the handbook will be readily available and users can see clearly what has changed in the current release. A different font color or type will probably be used to highlight text that has changed in the current release.

Update on Food Stamp Program Participation Grant (FSPPG)

There was no time to address this today.

CARES Wish

There was no time to address this today.

List

Next Meeting March 11, 2004
9:30 –12:30
DHFS Building 1 W. Wilson St. Room 672